

ANNUAL OPERATING PLAN
2022 AOP KICKOFF

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SECTION AGENDA

01

WHY

Be transparent about “true why”

02

WHAT

Identify key focus areas for your business

03

HOW

Trust the process

04

TOOLS, PROCESS, ARTIFACTS

05

Q & A



WHY DO WE NEED A FORMAL PROCESS?

CEO SURVEY

What are the most valuable outcomes of the annual operating planning process?

Company Alignment

Cash Budgeting and Optimization

Product Roadmap

Board Alignment

GTM Plan

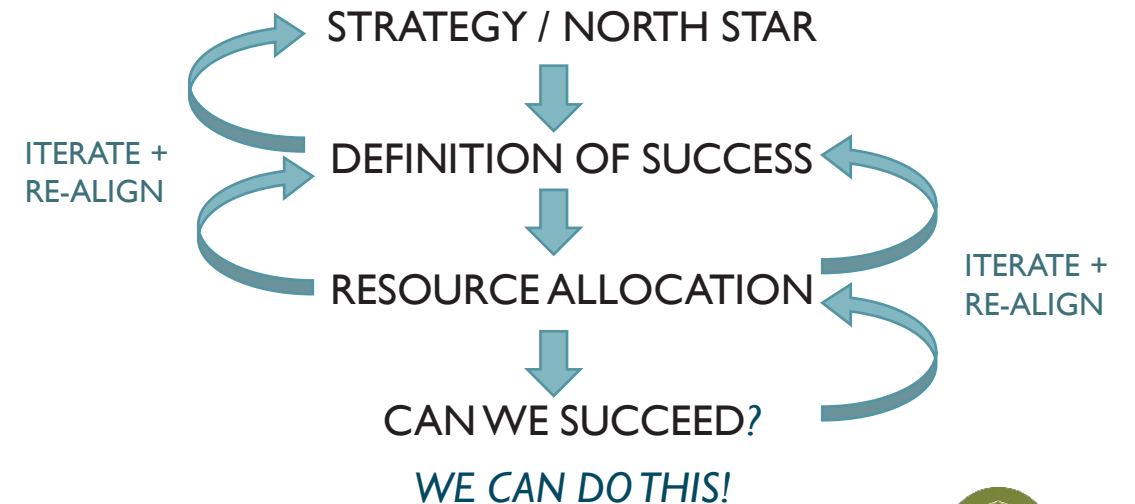
Talent Plan

Goal Setting and Compensation

BUDGETING & PLANNING – THE GOOD OLD DAYS

PAINFUL / MECHANICAL / DISENFRANCHISING

THE BETTER WAY: ITERATIVE ALIGNMENT AND TRADE-OFFS



WHAT? YOUR DATA DRIVEN PROCESS

01 IDENTIFY KEY FOCUS AREAS FOR YOUR BUSINESS



02 KNOW YOUR LEVERS AND INDICATORS

- DISTILL TO KEY LEVERS – NOT 3 / NOT 20
- LAGGING AND LEADING INDICATORS
- DIG IN AT WEEKLY ELT



HOW?

01 EXECUTIVE OWNERSHIP

NOT A FINANCE PROJECT

02 TRUST YOUR PROCESS

RUN IT LIKE A MILITARY OPERATION

03 EMBRACE THE PAIN

STRIVE FOR “MORE PERFECT” vs. “PERFECT”

04 CONFIDENCE BUILDER

WE CAN DO THIS

05 ONLY ONE PLAN

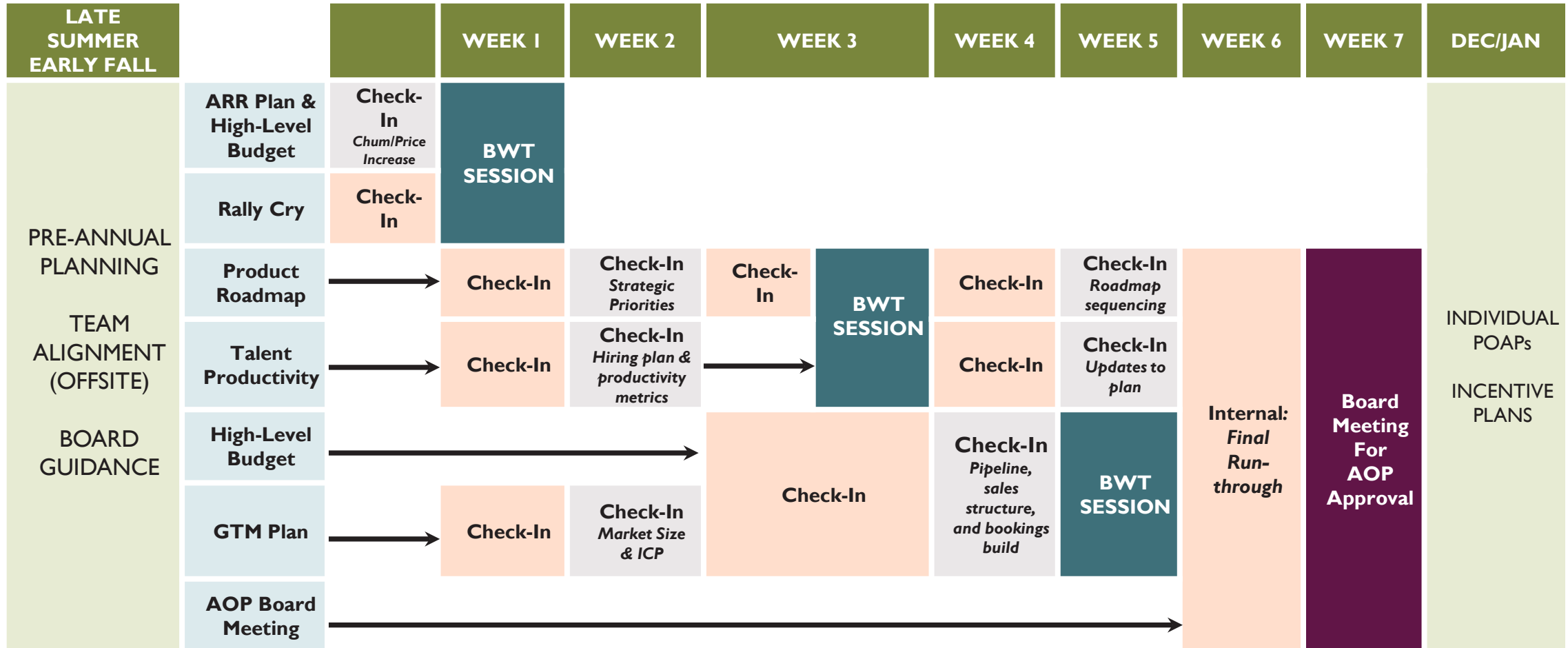
UNLESS THERE IS A BETTER PLAN...



TOOLS, PROCESSES & ARTIFACTS



PLANNING CALENDAR



ELT

COMPANY AWT

BOARD +
COMPANY AWT

BOARD



RALLY CRY

2022 is the year
*we ride the wave of
economic tailwinds and
achieve record growth*

2022 is the year
*we stabilize our platform
and achieve profitable
growth*

2022 is the year
*we transform into a
company customers learn
to love again*

2022 is the year
*we double down on our
core market and become
the industry standard*

2022 is the year
*we double our revenue,
become independent, and
think globally*



POAP – COMPANY

2022 is the year
we stabilize our platform and achieve profitable growth

We will...

Stabilize our Platform

Apply ruthless focus to the prioritization of R&D projects and use a rolling product roadmap in order to

- 1st - deliver a reliable and scalable service to our customers
- 2nd - address critical customer usability issues

Provide High Quality Customer Experience

Continue to listen closely to our customers and deepen our understanding of their workflow challenges

Leverage technology to provide efficient and scalable high-quality service

Develop internal onboarding programs with an enhanced focus on industry subject matter expertise

Grow Efficiently

Focus our GTM efforts on two key (overlapping) segments: SMB and Alternative Investment Managers

Hold our sellers to higher quotas and develop dedicated sales training support for the GTM team

As measured by...

- Improving NPS Score by 20 points from xx to xx

- Improving CSAT scores to > xx%
- Achieving Net Rev Retention Rate > xxx %
- Increasing coverage of CSMs on top accounts to ~\$x mm each

- Achieving \$xx mm in New Bookings/Cross Sells
- Reducing ARR At Risk to <\$xx mm



POAP – COMPANY

2022 - MARCH TO THE BEAT OF OUR OWN DRUM



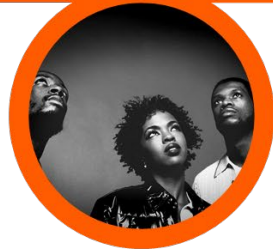
Sustainable Growth Revenue Engine

Recruit, train & improve performance.
Drive demand generation.
Activate referrals through channel relationships.



Targeted Platform Expansion

Product Delivery Engine
Standardize investment framework. Develop launch playbook and KPIs. Drive commercial products for Cross-Sell.



Customer Retention Customer Journey Alignment

Meaningful engagements with clients. Drive client advocacy & engagement. Risk management, not just coverage.



High Performance Culture Org Health and Alignment

Live our values and hold each other accountable.
Be resilient through change.
Look to internal talent before external.



01

\$xx mm
in New ARR Bookings

02

\$xx mm
in EBITDA Attainment

03

\$xx mm
in Net Rev Retention



edisonpartners

WEEKLY EXECUTIVE KPIS



REVIEW WEEKLY

RALLY CRY/
COMPANY
POAP



REVIEW BI-WEEKLY OR MONTHLY

TEAM
POAPS



REVIEW MONTHLY

INDIVIDUAL
POAPS

		CURRENT WEEK	PREVIOUS WEEK	TRAILING 4-WEEKS	TRAILING QUARTER	QUARTER TO DATE	COMMENTS
ARR							
	TOTAL ARR						
	LTM REVENUE						
	BOOKINGS - NEW						
	BOOKINGS - CROSS-SELL						
CASH							
	CASH BALANCE						
	\$ COLLECTED						
	AR > 30 DAYS						
	DSO						
CUSTOMER HEALTH							
	AT-RISK ARR (Top 200)						
	\$ CANCELLATION NOTICES						
	\$ EFFECTIVE CANCELLATIONS						
GO TO MARKET							
	SQL+ QUALIFIED PIPELINE						
	NEW MQLS						
	NEW SQLS						
	\$ IN TOP DEALS (>\$50K)						



| Q&A

